Dealerscope Merchandising

MARCH 1989
$7.00

The Marketing Magazine for Consumer Electronics and Major Appliance Retailing

The Booming Cellular Market

67th Annual Statistical & Marketing Report

On the Horizon: Video Snapshots

Builders Show: ...essure On ...ap Industry

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Dealerscope Merchandising
is published monthly by
North American Publishing Co.

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North American Publishing Company is a diversified publisher of Business and Professional Magazines.

Subscriptions, U.S. $65/year; Canada, US $84; other countries, US $132. Back issues and single copies, when available, mailed by publisher postage paid for $10. Postmaster: Send change of address form 3579 to DEALERSCOPE MERCHANDISING, 401 N. Broad St., Philadelphia, PA 19108.

BPA

PERISCOPE

Just a Stop Along the Learning Curve

NEW product development is seldom a simple act of design, manufacture and marketing. Sometimes it's damn the economics and full speed ahead—especially when a company has to solve several independent technical problems en route to a significant breakthrough.

Recently, we attended Sony's introduction of Hi8 products—the 8mm version of Super VHS. During the presentation Sony unveiled a Hi8 camcorder and home deck and, strangely, two Hi8 tape formulations, metal particle (MP) and metal evaporated (ME).

ME tape is super high-tech and very difficult and expensive to manufacture in quantity. Why, then, we asked Sony Consumer Video president Shin Takagi, offer it when a refined version of standard MP is capable of doing the job?

Takagi agreed that selling two tape formulations in what will be a limited high-end market perhaps made little business sense, but he noted ME offers 2 dB more in performance than MP and said Sony wants its Hi8 products to produce the very best camcorder video possible.

We think there is probably more here than meets the eye. If all goes according to plan, we expect that in three to four years, when we slide a second-generation ME cassette into a fully digital signal encoding VCR, we'll understand the perfect logic behind developing and perfecting, in 1989, a seemingly superfluous tape carrying a ludicrous ($22 for a P6-120) price tag.

Murray Slovick

DEALERSCOPE MERCHANDISING (ISSN 0011-7218) is published monthly by North American Publishing Co., 401 N. Broad St., Philadelphia, PA 19108. Telephone (215) 238-5300.
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Subscriptions cost $65 per year in the U.S. In Canada, $72; other countries, $132. Back issues and single copies, when available, mailed by publisher postage paid for $10.
Second class postage paid at Philadelphia, PA and additional entry. Postmaster: Send change of address form 3579 to DEALERSCOPE MERCHANDISING, 401 N. Broad St., Philadelphia, PA 19108.

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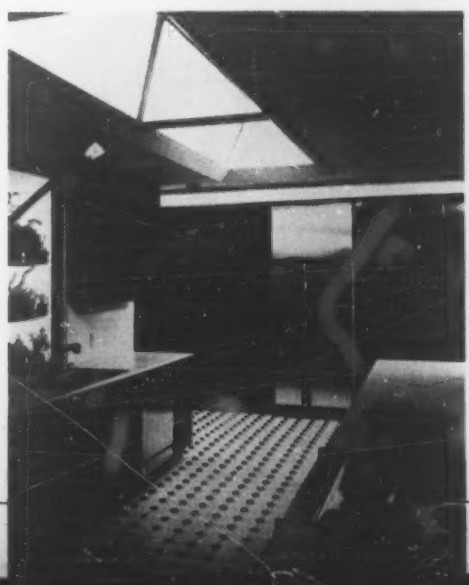

Home Builders Show 62
Price pressure on for major appliance industry

Dealerscope Merchandising's 67th Annual

Statistical & Marketing Report

THE DEALERSCOPE MERCHANDISING 67th Annual Statistical and Marketing Report has been organized into data on consumer electronics and major appliances, plus a market profile. This first part of the report contains five-year and one-year tables for consumer electronics. Our April issue will carry the same information for major appliances.

The data is based on information provided by leading manufacturers. The dollar figures cited are not sales figures but rather estimated retail sales figures for the products shipped from factories in 1988.

In mailed questionnaires and telephone interviews, survey participants were asked to give their best estimates of the percentage change in the number of units shipped industrywide for each line of merchandise. For this report, the change requested was for 1988 vs. 1987. Where a potential respondent disagreed with the 1987 estimate (published in the March 1988 issue), the respondent was asked for a "corrected" figure. Respondents were advised that "shipments" as used in this study include products imported from foreign companies but exclude products exported by U.S. manufacturers.

The number of units shipped in a particular year, therefore, represents the shipments of products available for sale in the United States.

Readers are cautioned that all information published in this 67th annual report is based on consensus rather than census. The questions did not ask for the annual changes in their own company's shipments or in retail prices of their own brand of merchandise. Instead, they were asked to indicate how much the overall total shipments had changed in percentage for the industry, and what changes there were in the average retail prices for the product category on which they were reporting.

The editors are grateful to the many manufacturers and trade associations who provided their help.

Statistical Report prepared by Napco Research Dept.:

Tery Moran-Lever
Joan Harrison
Navaz Mehta

CONSUMER ELECTRONICS

5 YEAR TABLES

Products	1988 Number Shipped (000)	1988 Retail Value ($000)	1987 Number Shipped (000)	1987 Retail Value ($000)	1986 Number Shipped (000)	1986 Retail Value ($000)	1985 Number Shipped (000)	1985 Retail Value ($000)	1984 Number Shipped (000)	1984 Retail Value ($000)
AUDIO/HIFI										
Audio Components, Total	**12,799**	**$2,419,413**	**12,085**	**$2,232,913**	**10,914**	**$2,041,492**	**8,200**	**$1,653,444**	**8,378**	**$1,509,777**
Amps, Pre-Amps, Tuners	678	202,750	609	173,143	597	168,100	537	150,790	549	152,633
Compact Disc Players	2,804	566,151	2,490	514,683	1,384	356,795	850	264,350	200	103,600
Equalizers	185	22,463	218	26,521	228	27,666	185	22,187	188	22,960
Receivers	1,976	543,968	1,957	505,077	1,843	483,327	1,533	393,981	1,553	391,356
Speakers (Components Only)	4,741	678,208	3,971	569,923	3,789	534,637	3,345	473,786	3,302	464,922
Tape Decks, Cassette	800	167,433	826	170,850	908	176,443	836	155,613	816	138,084
Tape Decks, Dual Cassette	649	116,387	632	111,056	600	108,000	*	*	*	*
Turntables (Excluding OEM)	958	122,053	1,382	161,660	1,565	186,524	1,442	172,055	1,696	213,018
Cartridges (Excluding OEM)	**1,803**	**57,767**	**2,539**	**78,054**	**2,795**	**86,421**	**3,047**	**94,000**	**3,585**	**114,003**
Compact Systems, Total†	**2,619**	**449,080**	**2,554**	**433,180**	**2,484**	**420,612**	**2,112**	**432,802**	**1,933**	**413,754**
Cassette Tape Recorder	65	7,171	64	7,128	60	8,100	*	*	*	*
Dual Cassette	70	8,571	68	8,354	65	8,775	*	*	*	*
Cassette/Turntable	574	76,376	574	76,376	620	83,700	*	*	*	*
Dual Cassette/Turntable	1,195	160,760	1,168	158,854	1,118	150,930	*	*	*	*
Cassette/Turntable/Remote Control	333	44,406	326	43,750	298	40,230	*	*	*	*
Cassette/Turntable/CD	30	11,933	28	10,898	25	9,975	*	*	*	*
Cassette/Turntable/CD/Graphic Equalizer	352	139,963	326	127,820	298	118,902	*	*	*	*
Changer Bimode‡	**	**	**	**	**	**	83	8,116	104	10,430
Cassette Bimode	**	**	**	**	**	**	87	15,946	92	17,295
Cassette Trimode‡	**	**	**	**	**	**	1,739	361,242	1,512	330,614
Cassette Quadmode‡	**	**	**	**	**	**	203	47,498	225	55,415
Headphones	**3,477**	**146,298**	**3,534**	**148,980**	**3,425**	**139,887**	**3,167**	**134,217**	**3,090**	**133,612**
Personal Portable Stereos, Total	**7,598**	**433,002**	**8,578**	**437,680**	**8,369**	**421,842**	**6,972**	**	**7,156**	**
Cassette and Radio	3,132	149,140	3,423	162,995	3,306	159,799	2,901	**	2,836	**
Cassette Only	3,054	70,160	3,679	84,531	3,644	85,024	3,289	**	3,575	**
Radio Only	785	12,473	935	14,849	939	15,019	782	**	745	**
CD Only	378	100,716	315	83,930	280	77,000	**	**	**	**
CD/Radio	249	100,513	226	91,375	200	85,000	**	**	**	**
Portable Tape Equipment, Total	**29,556**	**1,371,622**	**30,753**	**1,442,262**	**30,635**	**1,448,994**	**27,626**	**1,333,390**	**27,109**	**1,319,770**
Cassette Recorders	12,512	410,136	12,388	406,075	12,450	412,468	12,544	416,712	12,800	436,096
Radio/Cassette Combinations	16,254	919,761	17,572	994,336	17,398	994,833	14,432	882,228	13,745	853,015
Microcassette Recorders	790	41,725	793	41,851	787	41,693	650	34,450	564	30,659
Racked Systems	**1,635**	**892,000**	**1,500**	**800,000**	**954**	**560,267**	**877**	**527,858**	**810**	**492,456**
Radios, Total††	**27,767**	**761,361**	**30,678**	**817,542**	**29,896**	**845,494**	**27,528**	**808,136**	**27,391**	**822,551**
Clock	9,911	363,881	10,544	373,211	10,138	382,114	9,375	381,844	9,531	384,957
Portable	16,767	378,140	19,384	420,156	19,004	437,662	17,435	401,528	17,132	409,797
Table	574	19,340	750	24,175	754	25,718	718	24,764	728	27,897
ELECTRONICS FURNITURE										
Electronics Furniture, Total	**7,060**	**$1,118,111**	**6,779**	**$1,056,404**	**6,673**	**$1,027,891**	**6,088**	**$ 921,416**	**5,703**	**$ 819,320**
Audio Component Racks	1,282	198,983	1,115	173,029	1,014	160,212	975	154,440	959	150,400
Audio/Video Centers	310	115,622	295	110,116	241	95,753	201	83,636	173	69,351
Home Computer Tables	1,106	204,488	1,005	177,816	874	165,410	838	150,094	680	119,762
Microwave Oven Carts	948	151,033	998	158,982	951	147,890	839	120,992	766	109,048
Television Carts	2,495	215,269	2,490	214,827	2,767	245,516	2,505	231,637	2,551	233,544
TV/VCR/Videodisc Player Carts	919	232,716	876	221,634	826	213,110	730	180,617	574	137,215
MOBILE ELECTRONICS										
Auto Security Systems	**1,759**	**$ 357,667**	**1,371**	**$ 308,334**	**1,028**	**$ 256,945**	**	**	**	**
Autosound, Total	**24,511**	**1,432,397**	**22,981**	**2,182,996**	**21,625**	**2,021,504**	**21,763**	**$1,986,670**	**21,299**	**$1,936,467**
ID Cassette/Radio Combos	4,256	904,709	4,053	847,900	3,989	813,724	4,030	788,711	3,932	754,433
UD Cassette/Radio Combos	262	20,772	274	21,481	303	23,710	371	31,194	426	39,797
UD Cassette Players	406	26,620	423	27,444	466	30,158	554	37,617	615	45,492
Car Speakers (In Pairs)	17,540	1,069,508	16,241	993,044	15,010	942,167	15,162	979,465	14,635	936,055
Radios Only (Retrofit)	664	58,296	687	59,486	757	65,190	867	80,952	932	94,384
Equalizers	1,075	95,640	1,031	91,086	986	85,930	779	68,731	759	66,306
CD Players	140	70,359	124	61,342	55	26,125	**	**	**	**
CD Player/Radio Combos	168	91,202	148	81,213	60	34,500	**	**	**	**
CB Radios, Total	**2,184**	**166,636**	**1,997**	**152,553**	**1,884**	**145,458**	**1,729**	**134,592**	**1,637**	**125,834**
Base Stations	131	12,821	131	12,821	140	13,286	152	14,425	160	16,034
Mobile Units	2,053	153,815	1,866	139,832	1,744	133,173	1,577	120,167	1,477	109,800
Cellular Telephones	**700**	**577,500**	**331**	**509,210**	**265**	**422,675**	**	**	**85**	**161,500**
Radar Detectors	**1,953**	**295,229**	**1,834**	**277,240**	**1,688**	**262,837**	**1,227**	**186,786**	**942**	**136,967**

*Category not broken out separately **Category not reported †All units include stereo radio ‡Includes changer ††Excludes personal headphone type

CONSUMER ELECTRONICS

5 YEAR TABLES

Products	1988 Number Shipped (000)	1988 Retail Value ($000)	1987 Number Shipped (000)	1987 Retail Value ($000)	1986 Number Shipped (000)	1986 Retail Value ($000)	1985 Number Shipped (000)	1985 Retail Value ($000)	1984 Number Shipped (000)	1984 Retail Value ($000)
HOME OFFICE										
Calculators, Total	33,891	$ 853,184	33,827	$ 837,533	31,318	$ 727,258	33,166	$ 930,499	31,400	$ 945,726
Hand-Held	27,424	315,824	27,424	315,824	25,750	283,250	27,825	465,512	26,500	471,700
Desk-Top	6,467	537,360	6,403	521,709	5,568	444,008	5,341	464,987	4,900	474,026
Electronic Typewriters	2,481	537,396	2,186	484,141	2,038	446,213	850	185,300	650	154,050
Facsimile Machines	900	1,335,000	525	1,335,000	181	583,725	**	**	**	**
Personal Computers	4,192	3,809,881	3,598	3,312,940	3,075	2,982,750	4,025	**	5,000	**
Personal Copiers	n/a	n/a	291	257,713	269	238,623	**	**	**	**
Printers	1,790	1,184,821	1,599	1,039,317	1,568	1,071,461	**	**	**	**
SATELLITE EARTH STATIONS										
Complete TVRO Systems	277	$ 624,113	252	$ 507,822	255	$ 512,952	630	$1,386,000	450	$1,309,500
SOFTWARE										
AUDIO										
Blank Audiocassettes	349,517	$ 634,263	327,570	$ 581,893	268,500	$ 451,080	266,168	$ 569,600	260,969	$ 584,571
COMPUTER										
Blank Floppy Disks	651,757	878,421	545,403	763,844	425,000	680,000	205,063	**	241,250	**
Home Computer Software	25,843	685,188	20,674	527,068	18,175	494,667	**	**	**	**
VIDEO										
Blank Videotape, Total	300,502	1,151,013	280,551	1,075,225	276,438	1,160,566	156,088	1,132,481	98,353	924,891
Beta	28,097	104,120	29,576	100,115	34,795	145,095	27,897	209,506	25,392	224,465
VHS	270,680	1,025,407	249,475	958,324	240,643	1,003,481	128,191	922,975	72,961	700,426
8mm	1,725	21,486	1,500	16,786	1,000	11,990	**	**	**	**
Prerecorded Videotape, Total	84,641	2,905,798	69,183	2,417,110	65,441	2,415,718	43,100	1,913,259	19,690	962,970
Beta	4,162	132,964	5,947	196,983	6,707	246,229	7,430	300,618	4,922	221,224
VHS	79,944	2,763,535	62,701	2,210,828	58,234	2,160,489	35,370	1,612,641	14,768	741,746
8mm	535	9,299	535	9,299	500	9,000	**	**	**	**
Videodiscs	1,758	56,601	1,172	37,734	10,040	325,999	7,200	**	6,000	**
SPECIALTY RADIOS										
Specialty Radios, Total	8,383	$ 489,130	8,408	$ 490,220	8,154	$ 476,989	8,166	**	8,279	**
Multi-Band	6,300	233,289	6,313	233,771	6,129	226,962	6,191	**	6,402	**
Weather-Band	1,103	38,223	1,114	38,609	1,082	37,852	1,055	**	1,066	**
Scanners	980	217,618	981	217,840	943	212,175	920	**	811	**
TELEPHONE EQUIPMENT										
Corded Telephones	20,805	$ 808,439	21,900	$ 839,500	23,768	$1,006,083	22,403	$ 982,670	22,930	$ 894,437
Cordless Telephones	6,257	527,944	5,450	455,124	4,279	410,337	4,076	380,046	5,500	598,400
Telephone Answering Equipment, Total	8,007	703,593	7,332	654,278	4,856	535,020	3,306	371,165	2,628	298,015
Telephone Answering Devices	5,500	410,688	5,032	383,821	3,584	370,555	3,306	371,165	2,628	298,015
Integrated Systems	2,507	292,905	2,300	270,457	1,272	164,465	*	*	*	*
VIDEO										
B&W TV	2,738	$ 266,947	3,506	$ 339,627	3,730	$ 363,626	3,745	$ 367,497	5,068	$ 518,048
Camcorders	2,108	2,082,198	1,600	1,674,176	1,090	1,213,336	*	**	*	*
Color TV, Total	18,871	7,766,438	18,178	7,563,986	17,455	7,292,694	16,894	7,250,265	15,946	7,296,520
Portable LCD	148	40,448	114	36,050	100	35,000	*	*	*	*
Portable Non-LCD & Table	16,138	5,999,482	15,458	5,791,006	14,652	5,494,313	13,904	5,305,210	12,936	5,239,727
Console & Combo	2,585	1,726,508	2,606	1,736,930	2,703	1,763,381	2,990	1,945,055	3,010	2,056,793
Monitor/Receiver, Color	755	314,108	657	271,955	500	249,500	**	**	**	**
Projection TV	382	667,787	295	657,271	315	663,910	251	436,922	192	345,725
Video Cameras	90	62,277	110	76,885	181	118,284	402	266,309	484	380,347
Video Cassette Players	213	32,200	182	28,000	150	28,250	**	**	**	**
Video Cassette Recorders	10,998	4,348,168	11,700	4,553,055	12,685	5,067,458	11,912	**	7,143	3,443,679
Videodisc Players	164	30,101	142	25,994	125	24,875	179	51,015	188	54,492

*Category not broken out separately **Category not reported †All units include stereo radio ‡Includes changer ††Excludes personal headphone type

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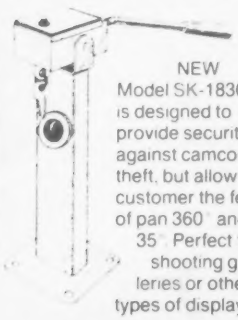

NEW Model SK-1830 is designed to provide security against camcorder theft, but allows the customer the feel of pan 360° and tilt 35°. Perfect for shooting galleries or other types of displays.

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ELECTRONICS HIGHLIGHTS

AUDIO/HIFI

Hifi component sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	23.8	19.5	+29.3
Audio/Hifi Specialty Store	33.4	34.6	+ 2.2
Catalog Showroom	3.7	4.5	-12.9
Catalog Store/Mail Order	7.1	8.0	- 6.0
Department Store	7.3	9.4	-17.8
Discount Store	4.0	4.4	- 3.7
Electronics Specialty Store	14.5	14.2	+ 8.1
Hifi Salon	4.6	4.2	+16.0
Other	1.6	1.2	+41.2
TOTAL	100.0	100.0	+ 5.9

Based on 12,799,000 units for '88 - 12,085,000 for '87

ELECTRONICS FURNITURE

Electronics furniture sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	13.0	13.0	+ 4.1
Audio/Hifi Specialty Store	4.0	3.5	+19.0
Catalog Showroom	14.0	14.0	+ 4.1
Catalog Store/Mail Order	13.0	13.0	+ 4.1
Department Store	8.0	8.5	- 2.0
Computer Specialty Store	2.5	2.0	+30.2
Discount Store	33.0	33.5	+ 2.6
Electronics Specialty Store	2.0	2.0	+ 4.1
Furniture Store	7.5	7.5	+ 4.1
Video Specialty Store	2.0	2.0	+ 4.1
Other	1.0	1.0	+ 4.1
TOTAL	100.0	100.0	+ 4.1

Based on 7,060,000 units for '88 - 6,779,000 for '87

HOME OFFICE

Electronic Typewriters

Electronic typewriter sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	4.5	4.0	+27.7
Audio/Hifi Specialty Store	3.0	2.5	+36.2
Catalog Showroom	22.0	24.2	+ 3.2
Catalog Store/Mail Order	19.0	16.5	+30.7
Department Store	9.0	7.5	+36.2
Discount Store	20.5	21.2	+ 9.7
Electronics Specialty Store	3.0	4.3	-20.8
Home Shopping Network	2.0	2.0	+13.5
Office Machines Store	8.5	7.3	+32.2
Warehouse/Wholesale Club	8.0	9.5	+ 4.4
Other	0.5	1.0	+43.2
TOTAL	100.0	100.0	+13.5

Based on 2,481,000 units for '88 and 2,186,000 for '87

MOBILE ELECTRONICS

CB Radios

CB radio sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Automotive Supply Store	4.0	7.0	-37.5
Catalog Showroom	6.5	15.0	-52.6
Catalog Store/Mail Order	4.0	9.0	-51.4
CB Specialty Store	38.5	12.0	+250.9
Department Store	2.5	3.0	- 8.9
Discount Store	6.0	10.0	-34.4
Electronics Specialty Store	17.0	17.5	+ 6.2
Home Shopping Network	3.0	5.0	-34.4
Membership Warehouse Club	4.0	8.5	-48.5
Non-Membership Wholesale Club	1.5	3.5	-53.1
Truck Stop	12.5	9.0	+51.9
Other	0.5	0.5	+ 9.4
TOTAL	100.0	100.0	+ 9.4

Based on 2,184,000 units for '88 and 1,997,000 for '87

Auto Security Systems

Auto security system sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Automotive Supply Store	11.0	9.0	+56.8
Catalog Showroom	2.3	4.0	-26.2
Catalog Store/Mail Order	7.0	5.7	+57.6
Discount Store	5.3	4.3	+58.2
Electronics Specialty Store	6.3	8.7	- 7.1
Membership Warehouse Club	6.4	3.3	+148.9
New Car Dealer	20.0	14.7	+74.6
Non-Membership Wholesale Club	1.0	1.3	- 1.3
Security System Specialist	35.0	45.0	- 0.2
Other	5.7	4.0	+82.8
TOTAL	100.0	100.0	+28.3

Based on 1,759,000 units for '88 and 1,371,000 for '87

Autosound

Autosound aftermarket sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	4.5	3.4	+41.2
Audio/Hifi Specialty Store	10.7	10.0	+14.1
Automotive Chain Store	15.3	18.0	- 9.3
Car Stereo Specialist	33.7	35.2	+ 2.1
Catalog Showroom	1.8	2.0	- 4.0
Catalog Store/Mail Order	1.8	1.6	+20.0
Department Store	1.8	1.6	+20.0
Discount Store	8.7	10.0	- 7.2
Electronics Specialty Store	14.7	13.6	+15.3
New Car Dealer	4.8	1.8	+184.4
Warehouse/Wholesale Club	1.2	1.9	-32.6
Other	1.0	0.9	+18.5
TOTAL	100.0	100.0	+ 6.7

Based on 24,511,000 units for '88 and 22,981,000 for '87

Autosound shipments by price range

	% of shipments		% change in units shipped
	1988	1987	1988/87
Under $50	4.0	4.4	– 3.0
$50—$89	7.0	6.4	+16.7
$90—$129	36.3	36.4	+ 6.4
$130—$179	28.7	28.6	+ 7.0
$180—$249	12.3	13.2	– 0.6
$250—$349	7.3	7.8	– 0.2
$350 and up	4.4	3.2	+46.7
TOTAL	100.0	100.0	+ 6.7

Based on 24,511,000 units for '88 and 22,981,000 for '87

Radar Detectors

Radar detector sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	8.5	8.0	+13.1
Automotive Supply Store	9.5	10.3	– 1.8
Catalog Showroom	10.0	11.7	– 9.0
Catalog Store/Mail Order	11.0	14.0	–16.3
CB Specialty Store	6.0	3.7	+72.7
Department Store	4.5	4.7	+ 1.9
Discount Store	14.0	12.0	+24.2
Electronics Specialty Store	10.0	9.6	+10.9
Home Shopping Network	4.0	5.0	–14.8
Membership Warehouse Club	3.0	3.7	–13.7
Non-Membership Wholesale Club	3.0	3.7	–13.7
Truck Stop	12.0	12.0	+ 6.5
Other	4.5	1.6	+199.5
TOTAL	100.0	100.0	+ 6.5

Based on 1,953,000 units for '88 and 1,834,000 for '87

SATELLITE EARTH STATIONS

Complete TVRO system sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	4.3	4.7	+ 0.6
Discount Store	2.0	1.7	+29.4
Electronics Specialty Store	4.7	3.7	+39.7
Specialty Satellite Earth Station Dealer	81.3	85.6	+ 4.4
Other	7.7	4.3	+96.8
TOTAL	100.0	100.0	+ 9.9

Based on 277,000 units for '88 and 252,000 for '87

SOFTWARE

Audio

Blank audiocassette sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	5.3	5.5	+ 2.8
Audio/Hifi Specialty Store	6.0	7.0	– 8.5
Camera Store	1.0	0.7	+52.4
Catalog Showroom	3.0	2.0	+60.0
Catalog Store/Mail Order	2.0	2.0	+ 6.7
Department Store	4.0	4.0	+ 6.7
Discount Store	35.4	36.5	+ 3.5
Drug Store	7.7	7.5	+ 9.5
Electronics Specialty Store	6.0	6.5	– 1.5
Grocery Supermarket	4.3	3.8	+20.7
Record Store	11.3	11.5	+ 4.8
Warehouse/Wholesale Club	7.3	5.0	+55.8
Other	6.7	8.0	–10.6
TOTAL	100.0	100.0	+ 6.7

Based on 349,517,000 units for '88 and 327,570,000 for '87

Video

Blank videotape sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	5.0	6.0	–10.7
Audio/Hifi Specialty Store	6.0	6.0	+ 7.1
Camera Store	4.0	3.0	+42.8
Catalog Showroom	1.5	2.5	–35.7
Catalog Store/Mail Order	3.0	2.7	+19.0
Convenience Store	1.5	0.5	+221.3
Department Store	3.5	5.0	–25.0
Discount Store	44.5	43.5	+ 9.6
Drug Store	6.5	7.0	– 0.5
Film Processors	1.5	0.5	+221.3
Grocery Supermarket	7.0	7.0	+ 7.1
Prerecorded Video Specialist	7.5	5.0	+60.7
Record Store	3.0	3.8	–15.4
Warehouse/Wholesale Club	3.5	4.5	–16.7
Other	2.0	3.0	–28.6
TOTAL	100.0	100.0	+ 7.1

Based on 300,502,000 units for '88 and 280,551,000 for '87

Blank VHS videotape shipments by grade

	% of shipments		% change in units shipped
	1988	1987	1988/87
Standard	89.5	87.5	+11.0
High Grade	10.5	12.5	– 8.9
TOTAL	100.0	100.0	+ 8.5

Based on 270,680,000 units for '88 and 249,475,000 for '87

Prerecorded videotape sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	2.0	2.7	– 9.4
Audio/Hifi Specialty Store	2.5	2.0	+52.9
Bookstore	5.5	6.0	+12.1
Camera Store	1.0	1.0	+22.3
Catalog Showroom	1.0	1.0	+22.3
Catalog Store/Mail Order	7.0	7.3	+17.3
Convenience Store	1.5	2.7	–32.0
Department Store	2.0	3.3	–25.9
Discount Store	26.5	19.0	+70.6
Drug Store	4.0	3.7	+32.3
Grocery Supermarket	5.5	3.7	+81.9
Record Store	8.5	7.3	+42.5
Video Specialty Store (VSDA)	33.0	40.3	+ 0.2
TOTAL	100.0	100.0	+22.3

Based on 84,641,000 units for '88 and 69,183,000 for '87

TELEPHONE EQUIPMENT

Telephone sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	6.7	6.0	+10.5
Audio/Hifi Specialty Store	2.5	3.5	–29.3
Catalog Showroom	10.8	13.1	–18.4
Catalog Store/Mail Order	10.2	10.7	– 5.7
Department Store	10.2	12.7	–20.5
Discount Store	29.8	22.7	+29.9
Drug Store	1.5	1.4	+ 6.0
Electronics Specialty Store	8.8	10.2	–14.6
Home Shopping Network	2.5	2.6	– 4.9
Phone Specialist	9.8	11.3	–14.2
Warehouse/Wholesale Club	4.0	3.1	+27.7
Other	3.2	2.7	+17.3
TOTAL	100.0	100.0	– 1.1

Based on 27,062,000 units for '88 and 27,350,000 for '87

Telephone answering equipment sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	7.0	3.8	+101.2
Audio/Hifi Specialty Store	3.0	4.8	–31.7
Catalog Showroom	10.8	13.8	–14.5
Catalog Store/Mail Order	9.7	8.7	+21.8
Department Store	12.0	13.3	– 1.5
Discount Store	24.8	20.4	+32.8
Drug Store	1.0	1.0	+ 9.2
Electronics Specialty Store	10.8	12.7	– 7.1
Home Shopping Network	3.0	2.6	+26.0
Office Machines Store	3.0	4.3	–23.8
Phone Specialist	8.2	8.3	+ 7.9
Warehouse/Wholesale Club	4.5	4.0	+22.9
Other	2.2	2.3	– 4.5
TOTAL	100.0	100.0	+ 9.2

Based on 8,007,000 units for '88 and 7,332,000 for '87

VIDEO

Color TV

Color TV sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	35.5	36.6	+ 0.7
Audio/Video Specialty Store	11.6	10.2	+18.1
Catalog Showroom	2.1	2.3	– 5.2
Catalog Store/Mail Order	10.1	10.0	+ 4.9
Department Store	11.4	12.4	– 4.6
Discount Store	16.0	15.2	+ 9.3
Furniture Store	3.9	3.6	+12.5
Membership Warehouse Club	2.5	1.7	+52.7
Non-Membership Wholesale Club	2.1	1.6	+36.3
Video Specialty Store (VSDA)	3.3	3.7	– 7.4
Other	1.5	1.1	–42.3
TOTAL	100.0	100.0	+ 3.8

Based on 18,871,000 units for '88 and 18,178,000 for '87

Color TV shipments by screen size

	% of shipments		% change in units shipped
	1988	1987	1988/87
8 Inch & Under	1.8	1.7	+ 9.9
9-12 Inch	2.8	3.7	–21.4
13-15 Inch	19.4	20.0	+ 0.7
19 Inch	26.4	30.7	–10.7
20 Inch	18.0	13.3	+40.5
21-22 Inch	1.0	1.3	–20.1
25 Inch	12.4	12.3	+ 4.7
26 Inch	7.8	9.0	–10.0
27 Inch	6.8	6.3	+12.1
30-31 Inch	1.9	0.7	+181.8
32 Inch & Over	1.7	1.0	+76.5
TOTAL	100.0	100.0	+ 3.8

Based on 18,871,000 units for '88 and 18,178,000 for '87

Color TV shipments with integral MTS

	% of shipments		% change in units shipped
	1988	1987	1988/87
With Integral MTS	27.3	21.0	+35.0
Without Integral MTS	72.7	79.0	– 4.5
TOTAL	100.0	100.0	+ 3.8

Based on 18,871,000 units for '88 and 18,178,000 for '87

ELECTRONICS HIGHLIGHTS

VIDEO - *Cont'd*

Black & White TV

B&W TV shipments by screen size

	% of shipments		% change in units shipped
	1988	1987	1988/87
4.5 Inch & Under	20.0	17.3	– 9.7
5 Inch	28.3	30.7	– 28.0
6-9 Inch	5.7	6.0	– 25.8
10 Inch & Over	46.0	46.0	– 21.9
TOTAL	100.0	100.0	– 21.9

Based on 2,738,000 units for '88 and 3,506,000 for '87

B&W TV sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	19.6	21.3	– 28.1
Catalog Showroom	7.4	7.2	– 19.7
Catalog Store/Mail Order	18.9	20.0	– 26.2
Department Store	10.0	11.5	– 32.1
Discount Store	38.1	35.2	– 15.5
Furniture Store	1.1	1.0	– 14.1
Other	4.9	3.8	+ 0.7
TOTAL	100.0	100.0	– 21.9

Based on 2,738,000 units for '88 and 3,506,000 for '87

B&W TV shipments by power source

	% of shipments		% change in units shipped
	1988	1987	1988/87
Battery-Powered	55.00	52.5	– 18.2
Other	45.00	47.5	– 26.0
TOTAL	100.0	100.0	– 21.9

Based on 2,738,000 units for '88 and 3,506,000 for '87

Projection TV

Projection TV sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	37.2	39.5	– 3.6
Audio/Hifi Specialty Store	13.5	12.5	+ 10.5
Catalog Showroom	1.0	1.0	+ 2.4
Catalog Store/Mail Order	2.5	2.0	+ 28.0
Department Store	12.8	12.5	+ 4.8
Discount Store	1.0	1.0	+ 2.4
Furniture Store	1.0	1.0	+ 2.4
Video Specialty Store	30.5	29.5	+ 5.8
Other	0.5	1.0	– 43.8
TOTAL	100.0	100.0	+ 2.4

Based on 302,000 units for '88 and 295,000 for '87

Video Cassette Recorders

VCR shipments by sound feature

	% of shipments		% change in units shipped
	1988	1987	1988/87
Mono	68.3	62.8	+ 2.2
Stereo	9.0	13.2	– 35.9
Stereo Hifi	8.3	8.7	– 10.3
Hifi	8.7	8.0	+ 2.2
Digital	2.6	3.3	– 25.9
Digital Hifi	3.1	4.0	– 27.1
TOTAL	100.0	100.0	– 6.0

Based on 10,998,000 units for '88 and 11,700,000 for '87

VCR sales by type of outlet

	% of shipments		% change in units shipped
	1988	1987	1988/87
Appliance/TV Store	21.3	20.9	– 4.2
Audio/Hifi Specialty Store	17.7	18.1	– 8.1
Catalog Showroom	3.1	3.3	– 11.7
Catalog Store/Mail Order	8.9	8.3	+ 0.8
Department Store	9.3	10.3	– 15.1
Discount Store	16.3	14.6	+ 4.9
Home Shopping Network	2.1	2.1	– 6.0
Video Specialty Store	3.3	10.9	– 71.5
Membership Warehouse Club	2.0	3.1	– 39.4
Non-Membership Wholesale Club	10.0	2.1	+ 347.6
Other	6.0	6.3	– 10.5
TOTAL	100.0	100.0	– 6.0

Based on 10,998,000 units for '88 and 11,700,000 for '87

Camcorders

Camcorder shipments by format

	% of shipments		% change in units shipped
	1988	1987	1988/87
Beta	1.4	4.6	– 59.9
VHS	61.8	58.3	+ 39.7
VHS-C	15.9	19.7	+ 6.3
8mm	20.9	17.4	+ 58.3
TOTAL	100.0	100.0	+ 31.8

Based on 2,108,000 units for '88 and 1,600,000 for '87

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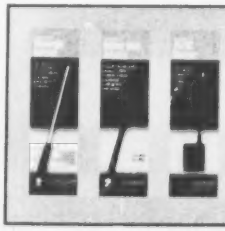

These accessories are also available: Model WTA-1 telescopic antenna, WTA-2 "rubber duck" antenna, and WTA-3 AC/DC charger.

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IMPORTS/EXPORTS

5 YEAR TABLES

HOME ELECTRONICS IMPORTS

Products	1988*** Number Imported (000)	1988*** Value** ($000)	1987 Number Imported (000)	1987 Value** ($000)	1986 Number Imported (000)	1986 Value** ($000)	1985 Number Imported (000)	1985 Value** ($000)	1984 Number Imported (000)	1984 Value** ($000)
VIDEO										
Antennas, TV	5,418	$ 6,408	4,497	$ 5,953	4,412	$ 6,427	6,532	$ 8,525	8,855	$ 12,536
B&W TV (10" & under)	825	38,009	2,168	107,005	2,934	145,794	1,589	85,801	1,431	96,280
B&W TV (11-17")	879	38,570	1,666	70,879	2,332	93,161	2,511	115,292	3,788	170,128
B&W TV (18" & over)	10	2,961	41	8,900	48	11,756	88	14,112	121	16,978
Color TV (10" & under)	520	73,237	838	113,349	616	85,297	740	110,765	566	89,547
Color TV (11-17")	4,156	541,841	4,521	567,498	4,039	510,425	2,776	383,067	3,091	451,155
Color TV (18" & over)	3,114	573,144	4,023	642,334	4,792	780,213	4,630	471,368	2,711	482,038
Videotape Recorders	11,486	2,521,921	13,842	3,026,651	18,216	4,543,425	16,765	4,304,000	9,387	2,862,407
Home Video Camera, B&W	345	68,872	337	77,583	233	77,535	196	52,044	119	38,503
Home Video Camera, Color	178	166,482	152	136,856	327	263,851	690	367,384	730	395,429
Picture Tubes, B&W	502	24,365	427	18,970	573	26,400	648	19,324	435	16,957
Picture Tubes, Color	167	48,684	732	62,449	2,322	105,908	1,711	84,675	793	46,466
AUDIO										
Antennas, CB	1,837	$ 7,264	1,189	$ 6,001	1,019	$ 5,702	696	$ 3,102	632	$ 3,315
Antennas, Radio	13,700	83,279	12,854	66,496	11,563	63,465	9,644	46,182	9,745	52,203
Loudspeakers	131,218	545,300	117,654	487,366	71,165	391,394	64,257	365,889	44,290	278,226
Microphones	11,708	64,472	12,017	45,578	5,924	34,596	2,175	26,925	2,249	25,240
Audio Frequency/Electric Amplifiers	5,446	306,839	5,210	280,119	4,384	248,356	4,519	263,473	3,628	188,879
Headphone/Electric Sound Amplifier Sets	34,256	111,490	42,360	132,293	25,682	104,697	26,395	101,976	30,199	119,357
Auto Transistor Radios	2,928	177,872	2,485	160,342	2,826	183,406	2,941	208,783	539	30,665
Clock Transistor Radios	12,303	118,967	12,271	116,489	13,996	138,661	13,031	156,914	15,571	196,932
AM Transistor Radios (Not Battery-Operated)	547	18,893	465	17,482	532	26,619	695	28,706	867	15,195
AM Transistor Radios (Battery-Operated)	1,674	5,944	2,539	8,146	3,073	10,006	4,854	25,238	5,784	30,328
FM AM/FM Multiband Transistor Radios (Not Battery-Operated)	2,512	234,403	2,858	245,351	2,656	172,715	3,358	190,007	3,007	192,642
FM AM/FM Multiband Transistor Radios (Battery Operated)	17,790	160,086	21,106	196,109	20,199	184,986	22,277	205,154	23,657	230,516
Radio/Phone Combos (including Consoles)	194	29,967	122	20,521	46	7,942	56	3,668	49	2,334
Radio/Phono/Tape Player Combos (Tape Player Trimode)	1,145	52,174	718	41,609	1,132	74,611	1,795	118,272	420	29,611
Automatic Record Changer	28	1,996	16	3,545	15	2,837	285	14,305	175	3,500
Stereo Phonos	29	6,429	86	6,408	51	4,306	354	19,653	247	14,990
Automatic Turntables	2,002	71,216	2,066	69,420	1,446	67,176	1,380	74,248	861	48,343
Turntables, Other	485	18,024	860	34,517	1,195	66,747	2,620	233,805	2,002	152,183
Compact Disc Players	4,709	585,023	3,567	445,318	3,266	408,134	*	*	*	*
Transceivers/CB	2,028	65,979	1,392	44,881	1,192	40,507	1,461	48,248	1,151	41,668
Tape Players, Auto	574	30,527	1,313	61,954	2,491	98,290	2,240	64,375	2,632	69,504
Tape Players, Other	6,304	86,709	7,251	93,580	5,038	76,968	5,918	106,134	6,155	112,734
Tape Recorders, Stereo (Cassette/Cartridge)	812	89,675	1,089	113,557	1,289	122,111	2,389	170,406	2,174	169,645
Tape Recorders, Stereo (Open Reel)	30	22,254	23	18,922	28	15,529	54	10,035	46	7,856
Tape Recorders, Mono (Cassette/) Cartridge)	1,021	31,311	696	27,396	574	31,985	1,030	39,918	1,812	63,529
Tape Recorders, Mono (Open Reel)	32	19,911	48	10,475	15	3,953	18	4,999	23	10,311
Tape Recorders, Battery (Cassette/Cartridge)	5,507	151,189	4,552	126,468	2,756	94,484	2,750	111,277	3,891	133,474
Tape Recorders, Battery (Open Reel)	79	18,412	47	23,769	52	22,406	74	20,161	56	16,490
Radio-Tape Recorder Combos	9,976	312,223	10,881	322,677	9,539	327,337	17,393	704,773	15,474	680,987
Radio-Tape Player Combos	33,957	1,699,197	32,502	1,533,559	25,079	1,342,462	25,909	1,346,305	20,414	1,029,316

HOME ELECTRONICS EXPORTS

Products	1988*** Number Exported (000)	1988*** Value ($000)	1987 Number Exported (000)	1987 Value ($000)	1986 Number Exported (000)	1986 Value ($000)	1985 Number Exported (000)	1985 Value ($000)	1984 Number Exported (000)	1984 Value ($000)
Radios	2,747	$ 149,079	2,135	$ 123,871	1,562	$ 96,239	1,251	$ 84,867	1,300	$ 106,953
Tape Recorders & Players	173	25,398	140	15,342	91	10,691	42	11,375	52	10,835
TV, B&W	135	13,667	96	12,335	77	10,947	115	12,700	79	8,044
TV, Color	1,125	341,843	490	155,795	357	116,955	273	88,003	267	92,632
TV Chassis & Kits	3,323	101,541	2,727	79,858	3,198	85,053	3,037	85,466	3,556	95,539

* Not broken out separately ** Dollars paid by importers excluding duty, freight, insurance, etc.
*** 1988 totals are projected figures based on nine-month totals

SOURCE: U.S. Dept. of Commerce Bureau of the Census

HOME OFFICE

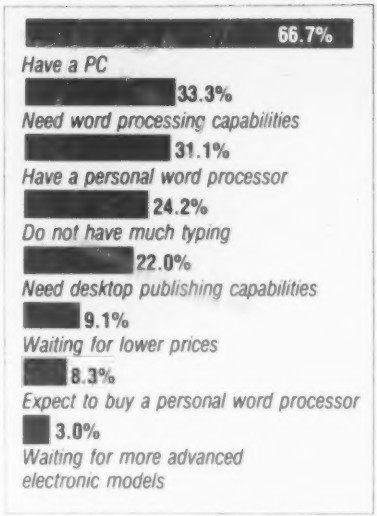
RETAILING

Electronic Typewriter Market to Polarize

THE demand for electronic typewriters is becoming more polarized as consumers opt for basic or high-end machines, according to a report by Venture Development Corp.

According to the report—The U.S. Market For Consumer and Office Electronic Typewriters Into the 1990s: Can It Withstand the Threat of Personal Word Processors and Personal Computers—office equipment dealers will be an even stronger purchase outlet in the future than in the past. However, significantly more business electronic typewriter end users will be purchasing based on low price from warehouse clubs and mail-order catalogs.

The research analysts expect office electronic typewriter sales to increase by only 1.5 percent each year between 1988 and 1993, from 1.3 million to 1.4 million units in 1993. Despite these low growth figures, the increase in demand for more memory and high-end CRT displays will maintain revenues. Office electronic typewriters will bring in more than 62 percent of total industry revenues over the next five years.



Business owner reasons for not purchasing additional electronic typewriters.

Analysts assert that electronic typewriters must approach personal word processors or personal computers in functionality to maintain usage in the office and compete with other text processing machines on dealers' shelves.

The analysts warn vendors to position office electronic typewriters as distinctly different machines—as being more economical, easier to learn and operate and able to produce better quality print than personal computers and personal word processors.

Women at Front of HO Trend

NEW data on the ever-changing home office market is showing a gender shift as the number of women working from home increased to outnumber their male counterparts.

Sharp Electronics recently released a study that shows the change in the market:

- Of the current 25 million home-office workers, 51 percent are female and 49 percent are male (1988 figures). In 1987, 52 percent were male and 48 percent were female.
- There has been a 3 percent growth in women home-office workers within the past year.
- 12.7 million women comprise the home-office market.
- 48.5 percent of the 12.7 million women are self-employed. Almost half of all women home-office workers are working on their own.

Respondents cited the following factors behind their reasons for working at home:

- Convenience.
- More time for children and family.
- Added flexibility.
- More control over business and personal lives.
- Have reached an "invisible ceiling" where they believe they cannot move any higher in corporate positions.

Culinary Incentive for Dealers

OKIDATA and Microamerica are offering a restaurant certificate incentive through American Express for dealers purchasing Okidata Microline printers from Microamerica.

Dealers purchasing the printers will receive an American Express Be My Guest Restaurant Certificate worth up to $30. The certificates can be redeemed anywhere the American Express Card is accepted.

Purchasers can buy as many printers as they wish as often as they like and receive the certificates through the end of March.

Be My Guest restaurant certificates